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President's Statement



Nicola Byrne
President 2017/2018

Being President in 2017 and 2018, the Brexit years, is challenging. The Association works hard to offer the fullest support and best advice to our members and the Government – as well as opening the doors and minds among our clients and colleagues across Europe. Of all times, with the current global economic climate, the Association must defend our country's economic lifeblood.

The exporting sector is one of Ireland's biggest achievements and has been the powerhouse behind our continued economic recovery, growth and job creation. It is one of the reasons that we are punching far above our weight globally! Services exports increased by €25 billion in 2017 and goods exports increased by €3 billion. That is an incredible performance! If we look at the growth in exports, there is a clear correlation between rising employment figures over past years and the strength that global trade can provide to Ireland's economy.

Brexit, in whatever form that will take, is coming. I think we should all take a moment to reflect on the fact that it is not the end of the world for the Irish economy. The Irish are renowned for being an adaptable nation and we have flourished after reinventing ourselves following the economic crash of 2008. If we look at the Economic Review by Ronnie O'Toole on page 20, we see that the value of Irish exports are now twice 2006 levels recorded prior to the global recession. Although Brexit will bring with it obstacles, it will undoubtedly offer plenty of opportunity. Irish exporters are most resilient and the Irish Exporters Association is here to help them navigate the complications that may result in our biggest trading partner heading for the exit of the EU.

We have traded with the UK for over 1,000 years and will continue to do so. With such an extent of connections, be it geographical, historical and familial, we are umbilically linked. They are our nearest neighbour and we will continue to work with them and nurture our trade relationship. While it will be a bit different, we will adjust. At the end of the day, business is people and we are the same people in the same place. We will have to work towards re-establishing our future relationship with the "New UK". At the same time, we will continue to foster our global relationships to position Ireland as a strategically 'open for business' country.

To face the future, preparation is key. Thus, it is crucial that exporters prepare an impact assessment, both on their own company exposures but also on their supply and customer chain exposures in relation to exchange rates, customs, tariffs, VAT, visa requirements as well as relevant EU regulation & legislation on them.

Understanding the risks involved is paramount. The Irish Exporters Association has a range of experts on hand to address members' concerns and challenges. In addition, we also run several information seminars across the country to brief exporters on possible implications. A key focus of our vision remains on signposting and providing our members with the right information to address any issues that affect them.

Irish exporters will continue to face many challenges that could hinder their growth and development. The IEA has the experience and contacts in Ireland, and overseas markets, to support Irish exporters navigating business and regulatory challenges to successfully grow their exports on the world stage.

In order for Ireland to maintain its economic growth and for Irish exports to continue to develop on the world market, the IEA represents its members under the four key policy pillars:

1. Maintaining and improving our National **Cost Competitiveness**;
2. Putting measures in place that will combat the **War for Talent**;
3. Broadening our Export Base and **Diversification of our Export Markets**; and
4. Encouraging and fostering **Entrepreneurship**, particularly focusing on services.

The Irish Exporters Association assists its members to grow their exports to world markets. We drive and support the growth and development of all exporting businesses based in Ireland. The IEA strategy is to support our members to grow their exports to world markets with 3 main functions:

- **Represent** the needs of members in the development of policy, lobbying, intervention at government level and in the media. Brexit and the Diversification of Export Markets, Cost Competitiveness, the War for Talent and Entrepreneurship are at the core.
- **Trade Services** include practical training, support and consultancy right across the supply chain including customs awareness and audits, export and import compliance, consular, business travel support, route to market and general assistance with trade related queries.
- **Knowledge Networks** support members to: explore new markets, route to market scenario planning, understand customs and supply chain challenges and provide thought leadership through a series of events and webinars. Networking and connectivity remain an important part of membership benefits.

The IEA represent the whole spectrum of companies within the export industry, including SMEs who are beginning to think about exporting for the first time, right through to global multinational companies who are already extensively exporting from Ireland, as well as the key services providers to the sector. It is the connecting platform for Irish exporters, providing members with practical knowledge, information and support across the Island of Ireland and in foreign markets.



Jean-Marc Ayrault, Minister of Foreign Affairs and International Development, France and Nicola Byrne, President, Irish Exporters Association at National Export Hub Seminar, Dublin, 22nd February 2017

Chief Executive's Review of 2017



Simon McKeever
Chief Executive

In April last year, Prime Minister Theresa May triggered Article 50, officially kicking-off the negotiations for the UK's exit from the EU. The IEA lobbied hard in 2017 for the Irish export industry on the Brexit issue at a national, EU and international level gathering concerns from our members right around the country and bringing these to Brussels and Washington as well as the Irish Government. The IEA continues to be committed to fulfil its responsibilities to its members and support Irish exporters through these uncertain times. .

In the days following the UK Referendum in June 2016, the Irish Exporters Association (IEA) surveyed our members on Brexit's perceived impact on their business. Performing the same survey in January this year, we observed changing attitudes and trends, highlighting the Irish export industry's resilience. Our members are increasingly looking to access new markets and diversify their exports, which shows an adaptability and an emerging preparedness to rebalance the industry's over-reliance on the UK market. 66% are planning to

diversify their export markets over the next 6 months, up from 54% directly after the referendum.

As reflected in the CSO figures on external trade for 2017, both tell the story that the Irish export industry is performing very well. Despite global uncertainty and the prospect of our biggest trading partner heading leaving the EU, we are driving forward! Irish export figures for 2017 were the highest on record, up 2% on the previous year. Exports to the EU and USA both increased by 4% and exports to the UK were up 9%.

We observed an increasing interest in Germany, with 29% of members looking to access that market. This reflects official CSO data which showed exports to Germany increasing by 25% in 2017. Germany was the top destination among members looking to diversify, with other EU markets also featuring prominently - France being third with 23%, Spain fourth at 19% and the Netherlands, Belgium, Italy and Sweden all appearing in the top 10. There is also a growing interest in English speaking further flung markets with the USA (27%), Australia (17%) and Canada (16%) all gaining popularity. Moreover, IEA members are increasingly looking towards high growth markets like China (10%), Japan (8%) and ASEAN nations (8%). Access to these markets is vital to further reduce Ireland's trade dependency on current relationships with the EU, US and UK.

Companies currently trading into the UK need to upskill in supply chain management. Many of the hurdles to trading into countries outside the EU could apply to future trade with the UK. Establishing a more market diversified export strategy now, will help exporters to develop the skills necessary to continue trading successfully in a post-Brexit Britain. The IEA has refined its training offering to support the industry in diversifying and preparing to access new markets. In July 2017, the IEA launched a new training initiative with this regard. *Brexit for your Supply Chain* is a practical training programme to help exporters prepare for Brexit. The programme gives participants clear guidance on customs procedures and documentation required in a post-Brexit scenario. Customs/Revenue attend the training days to be available to answer any customs queries and concerns from attendees. The programme affords delegates the opportunity to develop an understanding of how to plan for a Brexit situation in terms of customs and documentation in order to future-proof their business.

IEA training courses which assist Irish businesses¹ to prepare for Brexit now qualify for financial support from InterTradeIreland. InterTradeIreland aims to help companies navigate Brexit uncertainties and is offering financial support up to €2000/£2000 (inclusive of VAT) towards professional training fees in relation to Brexit matters. IEA courses qualifying for InterTradeIreland support include: Brexit for your Supply Chain; Incoterms® 2010; Customs Awareness; and a new training initiative on Authorised Economic Operator (AEO) status to support importers and exporters to comply with the Union Customs Code and to modernise and enhance the way in which goods flow across the international supply chain.

Some of the highlights for the IEA in 2017 include:

1. Over 1,000 professionals attended our various training courses. We saw a 23% increase in GDP attendees including 20 brand new GDP Champions who will oversee onsite operations of the process. GDP ensures patient safety by compliance throughout all stages of the supply chain and safeguards the quality of medicinal products.
2. The IEA's newly-launched training initiative, "Brexit for your Supply Chain," made up 34% of all non-GDP training in 2017.
3. Nearly 2,000 export industry professionals attended our market and industry focused events all around the country.
4. The IEA Supply Chain Series ran 8 events around the country, attended by over 400 exporters and manufacturing companies. The 4 large seminars included IEA Expert Advisory Panels, keynote addresses from industry speakers, panel discussions and breakout sessions including the IEA Multimodal Group. The Revenue Commissioners, attending each seminar, advised attendees of specific regional customs opportunities and challenges as well as customs procedures when dealing with third countries. The four manufacturing roundtables were well attended and discussed local issues and provided solutions to members.
5. The IEA's National Export Hub held 13 events around the country, attended by over 500 representatives of Irish SMEs. 17 SMEs graduated the second class of the Export Knowledge Programme, an educational programme launched in January 2016 to support SMEs in improving their exporting capabilities.
6. The top five countries for visa applications were China, India, Russia, Iran and Nigeria.
7. IEA membership increased regionally by 4% from increased engagement at our regional events and support from our Southern and Western Regional Councils.
8. Kildare-based Irish Dog Foods was crowned Exporter of the Year at the 2017 Export Industry Awards after winning the Medium Size Exporter of the Year category. Over 530 attendees saw 11 companies win Category awards across a range of sectors.
9. We lobbied the Irish Government and in Brussels under our policy pillars: Brexit and the Diversification of Export Markets, Cost Competitiveness, the War for Talent and Entrepreneurship. Our interventions at government level and in the media included: Brexit and Ireland's post-Brexit relationship with the UK and the EU; reform in the education sector and the skills shortage; Ireland's cost competitiveness; entrepreneurship; infrastructural improvements, such as broadband and regional connectivity; the expansion of our export base and market diversification.

2017 was a mixed year for Irish exporters amidst a backdrop of political uncertainty in some of our key markets, especially the drawn-out Brexit negotiations. We look forward to further clarity on the

¹ Applications must be from an SME (250 employees or less) and Turnover ≤ €50m (£ equivalent); other eligibility criteria apply, see: <http://www.intertradeireland.com/brexit/vouchers/>

In 2017, the IEA lobbied on a number of key issues for exporters including:

- Action Plan for Jobs 2018
- All-Island Transport Sectoral Meeting On Brexit
- All-Island Sectoral Dialogues on Brexit
- All-Island Civic Dialogue on Brexit
- Brexit and Ireland's relationship with the UK and EU post UK EU referendum
- Brexit Enterprise Forum
- Brexit Stakeholder Forum
- Budget 2018
- Building SME export competence
- Canada-EU economic and trade agreement (CETA) – opportunities for trade and investment
- Citizen's Dialogue on the Future of Europe
- Clarity on Ireland's position in forthcoming Brexit negotiations in relation to: Trade, Customs & Tariffs, State Aid rules
- Companies (Accounting) Bill 2016 – Section 1274(2)(a)(iii) - Impact on Exporters
- Comparative higher cost of finance from Irish banks v's EU banks
- Customs Consultative Committee
- Department of Jobs, Enterprise & Innovation and Department of Education & Skills Brexit Stakeholder Engagement Event on the topic of Enterprise Skills Needs and Brexit
- Department of Taoiseach Brexit Group
- Department of Jobs, Enterprise & Innovation Enterprise Forum on Brexit and Global Challenges
- Entrepreneurship
- European Chamber Delegate Trip to Brussels
- Expansion of our export base and market diversification
- Export Finance
- Export infrastructure & competitiveness
- Export Trade Council
- Global Irish Civic Forum
- Higher Education Authority stakeholder consultation on new strategic plan
- Importance of East-West relationship in Brexit negotiations
- Infrastructural improvements, such as broadband in the West
- Levying of 23% import VAT on imports from the UK in the event of Brexit
- Market Opportunities for Ireland
- National Economic Dialogue
- Reform in the education sector and the skills shortage
- Review of Enterprise 2025
- Rosslare Europort Stakeholders Advisory Group
- Support for the rural economy and the potential damage to rural Ireland as a result of the effects of Brexit on local businesses and on SME's in particular
- The impact of Brexit on Maritime Transport Regulation
- UK Parliamentary Select Committee on exiting the EU

In the framework of her visit to Dublin in October, the European Commission Representation in Ireland invited the IEA to meet Violeta Bulc, European Commissioner for Transport, to discuss the modernisation of transport and mobility as well as the challenges arising from Brexit.

The IEA was also a key stakeholder in the Department of Foreign Affairs and Trade's Brexit stakeholder forum, which launched in September, and the Department of Business, Enterprise and Innovation's Enterprise Forum on Brexit and Global Challenges.

The Regulation of Lobbying Act 2015 came into effect from 1st September 2015 and with it, the requirement for those who lobby designated public officials to register and report on their lobbying activities. The IEA welcomed this transparency and all IEA lobbying activity can be viewed at the following website link: <https://www.lobbying.ie/organisation/665/irish-exporters-association>. In 2017 the IEA made 12 returns to the register of our lobbying activity.

Policy Submissions

The IEA presented the following verbal policy submissions:

- Review of the Capital Plan to the Select Committee on Budgetary Oversight
- The potential impact of Brexit on Irish exports to the Joint Committee on Foreign Affairs and Trade and Defence
- National Assembly for Wales - External Affairs Committee - inquiry into ports in Ireland and Wales

The IEA also provided written submissions on:

- Impact of the UK Referendum on Membership of the European Union on the Irish Agri-Food & Fisheries Sectors to the Joint Committee on Agriculture, Food and the Marine
- Trade Tourism and Investment, Asia-Pacific and Americas Strategies to the Department of Foreign Affairs and Trade on the new Trade, Tourism and Investment Strategy (to 2025)
- Public Consultation on Proposed Exchequer – Employer Investment Mechanism for Higher Education and Further Education & Training to the Department of Public Expenditure and Reform
- Public consultation on the draft of “Ireland 2040 – Our Plan: National Planning Framework” to the Department of Housing Planning and Local Government

Budget 2018

The IEA lobbied very particularly in the 2018 Budget in the areas of: maintaining and improving our national cost competitiveness; putting measures in place that will combat the war for talent; broadening our export base and diversification of export markets; and encouraging and fostering entrepreneurship. The IEA advised that the Government prepare a prudent Budget that would encourage the growth of Irish exports to world markets.

The IEA welcomed the increased investment across health, education, housing and public transport as these are all areas that will increase our competitive position globally. The establishment of the Rainy Day Fund with at least €1.5 billion transferred to it from the Ireland Strategic Investment Fund and annual contributions of €500 million is an important step to insulate us from global uncertainties, including but not limited to Brexit.

With regard to Brexit, we welcomed the introduction of the small “Brexit Loan Scheme” which may assist small and medium business in Ireland with short term working capital. We particularly welcomed the increased funding to the Department of Foreign Affairs and Trade and the Department of Business, Enterprise and Innovation and the increased support for Bord Bia. However, in the face of the significant threat that Brexit poses to our economy, it is our view that these measures are the bare minimum the Government needs to do. The implications of potential customs and import VAT being imposed on Irish/UK trade are a potential tsunami – this is just a start!

The IEA understands that a significant programme of reinvestment is needed to address demographic challenges and for the government to continue to deliver a steady stream of quality graduates to meet

national economic and societal objectives. Given the high proportion of graduates in the Irish workforce, employers are major beneficiaries of the outcomes of Higher Education and we note the levy paid by employers toward the National Training Fund being increased. Would it have been better to incentivise this through the tax system? Given that employment levels have been showing such strong growth and are set to near full employment in 2018 with Irish employers experiencing a skills shortage, the IEA would have hoped to see a restructuring of the National Training Fund to increase training opportunities for those in employment to upskill.

The IEA also welcomed the very small moves in taxation measures but there is still a huge amount more that needs to be done to maintain our competitiveness at home and internationally, particularly when you consider the personal income tax bands in the UK and that some Irish companies are already assessing where to position staff.

The IEA were very disappointed with only a €200 increase in Earned Income Credit for the self-employed, this Budget was the perfect opportunity to match equality between PAYE and the self-employed sector. Levelling the playing field between PAYE workers and the self-employed is an issue that has been long overdue. Ireland needs to have a taxation system that does not penalise the risk-takers who drive the economy and create employment, we need to reward entrepreneurs and not propagate a potential barrier to business development and we feel that this was a missed opportunity.

The introduction of a share-based incentive scheme was very welcomed, especially in the start-up sphere as this will really assist them in competing with multinationals for talent by profit sharing.

Export Industry Awards

The Irish Exporters Association's Export Industry Awards 2017 was the 17th year of the premier event recognising the achievements of Irish Exporters and the businesses that support them. The Export Industry Awards 2017 was supported by a number of corporate and industry sponsors. Platinum Sponsors: Bank of Ireland, Etihad Airways, KPMG, UCD Michael Smurfit Graduate School of Business and Category sponsors Bord Bia, Dixon International Logistics, Enterprise Ireland, Facebook, GS1 Ireland, Irish Maritime Development Office and media partner The Times. It is important that we highlight the



Sponsors launch the Export Industry Awards 2017 at Dublin Airport. Pictured from L-R: Marie Armstrong, Partner, KPMG in Ireland; Caroline Kinsella, Head of Business Development, UCD Smurfit Executive Development; Simon McKeever, Chief Executive, Irish Exporters Association; John Moclair, Head of Global Customer Group with Bank of Ireland Global Markets; and Beatrice Cosgrove, General Manager for Ireland, Etihad Airways

exporting companies who have excelled in their sector despite some uncertain trading conditions and to bring to light those businesses in the sector who have been fundamental to Ireland's success. The award categories cover a broad range of export sectors, including emerging exporters, established indigenous exporters of manufactured goods, services, software food and drink and multinational companies, as well as the key support sectors of logistics and maritime services.

On Friday, 17th November at the Clayton Hotel Burlington Road Dublin, 11 companies won individual category awards across a range of sectors. Kildare based Irish Dog Foods was crowned the overall Exporter of the Year Award 2017 after winning the Medium Size Exporter of the Year Award category earlier in the evening. Irish comedian Mario Rosenstock MC'd the black-tie Awards Ceremony and Gala Dinner, which was well attended with nearly 550 export industry professionals. Other guests included Mary Mitchell O'Connor TD, Minister of State at the Department of Education with special responsibility for Higher Education, representatives from over 25 Embassies, Secretary Generals and Awards sponsors.



L-R: Nicola Byrne, President Irish Exporters Association, Liam Queally, Exporter of the Year 2017 and CEO of Irish Dog Foods, Beatrice Cosgrove, General Manager Ireland, Etihad Airways Ireland and MC Mario Rosenstock at the Export Industry Awards 2017

Irish Dog Foods is a pet food manufacturer in own-label and branded products for pet speciality retailers, wholesalers and discounters across the globe and have expanded their production facilities in Naas to over 220,000 sq feet increasing production capacity by 350% in 18 months. Irish Dog Foods recognised that the key to the success of its growth strategy was to concentrate on growing their export markets. The company was and continues to be a key supplier to many retailers who have a presence in multiple-

markets. Based on their record of service, quality and value they have been able to open new markets with these customers one region after the other. The Export Industry Awards began in 2001 and has gained momentum year on year. The 2017 Awards saw the biggest and the most competitive year yet with more unique applications than ever before. The Independent Judging Panel was particularly impressed with the competitiveness of the applications and the international opportunities companies from Ireland were winning.

2017 Export Industry Award Category Winners

- **Medium Size Exporter of the Year Award**, sponsored by Bank of Ireland: Irish Dog Foods
- **Export Innovation of the Year Award**, sponsored by KPMG: Ribworld
- **Services Exporter of the Year**, sponsored by UCD Michael Smurfit Graduate Business School: Ventac
- **Food & Drink Exporter of the Year**, sponsored by Bord Bia: Irish Distillers
- **Life Sciences Exporter of the Year**, sponsored by Dixon International Logistics: Sanofi Waterford
- **High Potential Exporter Award**, sponsored by Enterprise Ireland: Broderick's Brothers
- **Small & Emerging Exporter of the Year**, sponsored by Facebook: Diaceutics
- **Multinational Exporter of the Year**, sponsored by GS1 Ireland: Bausch + Lomb Ireland
- **Maritime Services Company of the Year**, sponsored by the Irish Maritime Development Office: Irish Continental Group, Container & Terminal Division
- **Technology Exporter of the Year**: eShopWorld
- **Logistics & Supply Chain Company of the Year**: Dixon International Logistics

2017 Export Industry Awards Independent Judging Panel

Chairperson: Pat Higgins, Head of Business Development, Queally Group

Independent Observer: Bebhinn Behan, Innovation Manager, KPMG

Group A: Services, Export Innovation, Technology

- Elaine Coughlan, Managing Partner, Dublin, Atlantic Bridge
- Mary Lambkin-Coyle, Professor of Marketing, UCD Michael Smurfit Graduate Business School
- Siobhan McManamy, Director of Markets, Tourism Ireland
- Padraic White, Chairman, Collins McNicholas Recruitment & HR Services

Group B: High Potential, Medium Size, Small & Emerging, Food & Drink

- Kieran Comerford, Head of Enterprise, Local Enterprise Office
- Eugene Forde, Principal, Indigenous Enterprise Development, Department of Jobs, Enterprise and Innovation
- Margaret Hearty, InterTradelreland, Director of Programmes and Business Services
- Breege O'Donoghue, Chair, Design & Crafts Council of Ireland

Group C: Logistics, Life Sciences, Multinational, Maritime Services

- David Brophy, Partner & Patent Attorney, FR Kelly
- Tommy Fanning, Head of Biopharmaceuticals & Food, IDA Ireland
- Jim Gannon, Chief Executive, Sustainable Energy Authority of Ireland
- Howard Knott, Logistics Consultant

2017 Export Industry Awards Alumni Programme

Designed in conjunction with KPMG and UCD Michael Smurfit Graduate Business School, the 2017 Export Industry Awards Alumni Programme was open to past category winners and former shortlisted Export Industry Award winners. The alumni programme included a masterclass on negotiation and workshops covering, strategic development and execution, strategic finance, innovation and growth, change management, organisational renewal and transformation, and more.



Export Industry Awards, Information Seminar Dublin, 3rd May 2017

IEA Supply Chain Series 2017

Series run in partnership with Ulster Bank, Iarnród Éireann and Rhenus Logistics

The IEA, in association with Ulster Bank, Iarnród Éireann Irish Rail, Rhenus Logistics and media partner Fleet Transport, in April 2017 launched a new supply chain initiative, the IEA Supply Chain Series 2017. The Series consisted of 4 IEA Supply Chain Large Seminars, 4 IEA Multimodal Working Group meetings and 4 IEA Exporters Working Group meetings which took place across the country throughout the year.

The IEA Supply Chain Large Seminars each had a specific industry focus on LifeSciences, Food & Drink, ICT, Manufacturing, Energy and Engineering, and included updates to regulatory and legal changes, as well as offering best practice advice across the supply chain by experts.

The IEA Exporters Working Group, Chaired by Patrick Daly, aimed to provide corporate exporters with an open forum to focus on national and regional issues including trade, finance, energy and transport while addressing sector issues.

The IEA Multimodal Working Group (formerly known as IEA Railfreight Group) was Chaired by Howard Knott and provided a platform to discuss the importance of multimodal partnering in the supply chain and associated opportunities and challenges. Maintaining Ireland's position as a leading location to conduct supply chain and logistics activities was a key deliverable of this initiative.

Schedule of IEA Supply Chain events in 2017

- 7th April 2017, Launch & IEA Exporters Working Group 1, Ulster Bank HQ, George's Quay, Dublin 2
- 26th April 2017, IEA Supply Chain large seminar 1, Dundalk, Co Louth
- 4th May 2017, IEA Exporters Working Group 2, Claremorris, Co Mayo
- 16th May 2017, IEA Supply Chain large seminar 2, Galway
- 15th June 2017, IEA Supply Chain large seminar 3, Cork
- 27th September 2017, IEA Exporters Working Group 3, Limerick
- 17th October 2017, IEA Exporters Working Group 4, Cork
- 7th December 2017, IEA Supply Chain large seminar 4, Ulster Bank HQ, Dublin 2



A



B



C



D

A. Supply Chain Seminar Series sponsors Declan Sinnott, Managing Director, Rhenus Logistics Ireland; Eddie Cullen, Managing Director, Commercial Banking Division, Ulster Bank; Glenn Carr, General Manager Freight, Iarnród Éireann/Irish Rail; and Simon McKeever, Chief Executive, Irish Exporters Association
 B. Simon Barry, Chief Economist, Ulster Bank Republic of Ireland speaking at the IEA Supply Chain Series roundtable event at Ulster Bank HQ, George's Quay, Dublin 2 on 7th April 2017
 C. IEA Expert Advisory Panel and Industry Speakers at "Securing the Interests of Irish Exporters in the South" IEA Supply Chain Seminar which took place at the Radisson Blu Hotel & Spa, Little Island, Cork and attracted over 100 exporters and manufacturing companies from all over the south of Ireland on 15th June 2017
 D. David Collins, GPAS Business Consultant, Hewlett Packard Enterprise; Simon McKeever, Chief Executive, Irish Exporters Association; and Olwyn Long, Head of Ulster Bank Markets Galway, at the "Securing the Interests of Irish Exporters in the West" IEA Supply Chain Seminar which took place in at the Clayton Hotel Galway and attracted over 80 exporters and manufacturing companies from all over the west of Ireland on 16th May 2017

National Export Hub

The Irish Exporters Association's National Export Hub in collaboration with InterTradeIreland was launched in March 2015 for a 3 year programme of events aimed at supporting SME's to improve their exporting capabilities. The third and final year of the National Export Hub proved to be a resounding success. This public-private partnership enabled and empowered small and first time exporters to grow their business through exporting. The National Export Hub offered a dedicated service to help and support SME's, whether assisting them on their export journey or helping those new to exporting to advise and support them as they look to scale their business by entering new markets. The key partners in 2017 were ABP Food Group, AIB, DHL, Euler Hermes and PwC, and collaborators: Bord Bia and the Department of Foreign Affairs and Trade.



Shauna Gallagher, The Natural Beauty Pot and Export Knowledge Programme Class Representative 2017 and Simon McKeever, Chief Executive, Irish Exporters Association at the graduation ceremony of the Export Knowledge Programme 2 which took place on 17th May 2017 at the Thinking House, Bord Bia, Dublin 2 with the Irish Exporters Association, InterTradelreland, Hub Partners and Collaborators

2017 National Export Hub programme of events:

Export Knowledge Clinics:

- Athlone: 25th January - The Midlands Export Knowledge Clinic
- Dublin: 23rd March – “Credit Risk and Credit management” (hosted by Euler Hermes)
- Cork: 24th May – “Strategic Finance and business Planning for Exporters” (hosted by PwC)
- Dundalk: 14th June – “Understanding the Market – the fundamentals of Key Market research (hosted by ABP)
- Galway: 18th October – “Importance of Branding and Social Media for business”
- Dublin: 6th December – “International logistics – what Exporters should know”

Large events

Dublin – 22nd February – Clarion Hotel, Liffey Valley, Dublin



Jean-Marc Ayrault, Minister of Foreign Affairs and International Development, France with Nicola Bryne, President, Irish Exporters Association and Hub Partners and Collaborators at the National Export Hub Seminar, Dublin, 22nd February 2017

The French Minister of Foreign Affairs and International Development Jean-Marc Ayrault addressed SMEs at the National Export Hub seminar on 22nd February the Clarion Hotel, Liffey Valley, Dublin. This seminar focused particularly on the French market, existing collaboration between Ireland and France and the potential opportunities of trade and investment with France, particularly in light of the UK’s decision to exit the EU. The Minister highlighted French opportunities for Irish SME’s and discussed the Irish-French bi-lateral trade relationship, Brexit and the future of Europe.

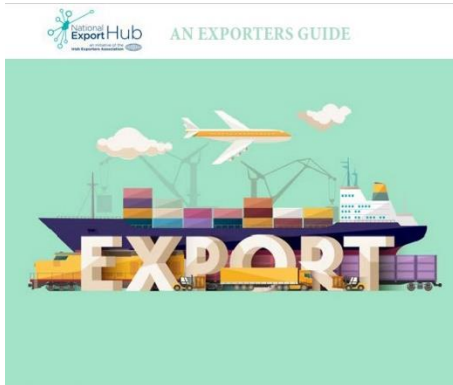
Shannon – 20th September – Shannon Airport Viewing Gallery

The Ambassador of Canada to Ireland, Kevin Vickers, addressed SMEs at the National Export Hub Seminar which took place at the Viewing Gallery, Shannon Airport, Co Clare on 20th September. The event, titled “Market Diversification and Business Opportunities in Canada and North America” focused particularly on the potential export opportunities for Irish companies trading in Canada and North America. The event was headlined with a keynote address from H.E. Kevin Vickers, the Ambassador of Canada to Ireland who provided expert insight into the new Comprehensive Economic and Trade Agreement (CETA) between the EU and Canada.



H.E. Kevin Vickers, the Ambassador of Canada to Ireland and Simon McKeever with speakers and panellists of the National Export Hub Seminar “Market Diversification and Business Opportunities in Canada and North America” which took place at Shannon Airport on 20th September 2017

Attendees were briefed on: tariff elimination; simplified border procedures; streamlined supply chains; and greater access to Canadian government procurement contracts.



At the seminar, the IEA National Export Hub launched its first publication, ‘An Exporters Guide’, a publication aimed at providing top tips for exporting. ‘An Exporters Guide’ is a collaboration between the Irish Exporters Association, the programme sponsors ABP Foods, AIB, DHL Express, Euler Hermes and PwC and programme collaborators Bord Bia, Department of Foreign Affairs and InterTradeIreland. The publication is an important point of reference for anyone looking to expand their business beyond Ireland. It is targeted at Irish SME’s, early stage and first time exporters and provides advice on all aspects of exporting including Finance, Insurance, Logistics and Tax. It also features best practise advice from a well-established exporter and first hand advice from an early stage exporter.

Export Knowledge Programme

In May 2017, the National Export Hub graduated the second round of participants in the Export Knowledge Programme, an educational programme launched in January 2016 which aimed to support SMEs to improve their exporting capabilities. Simon McKeever, Chief Executive of the IEA conferred the graduating class of 2017 at a ceremony which took place on 18th May at The Thinking House, Bord Bia, Dublin 2, with the Irish Exporters Association, InterTradeIreland, Hub Partners and collaborators.



Export Knowledge Programme, Graduating Class of 2017 with Irish Exporters Association, InterTradeIreland, Hub Partners and Collaborators at the graduation ceremony of the Export Knowledge Programme 2 which took place on 17th May 2017 at the Thinking House, Bord Bia, Dublin 2.

The Export Knowledge Programme, the education element within the National Export Hub in collaboration with InterTradeIreland, aims to take selected participants through an educational and support led journey to improve their capability to export into existing and new markets on the Island of Ireland and internationally. Applicants are initially assessed to ensure that their business has the structure and resources to support growth and entry into new export markets.

A total of seventeen businesses were selected to embark on the seven month educational workshop programme covering every aspect of the export journey and have taken part in workshops in the areas of: Selection and management of channel partners/distributors; Knowledge of international legal, contract and IP issues; International financial management, cost control, quality assurance, financial risk management; E-commerce skills and social media skills, marketing mix skills; International logistics (air, sea, rail, road), order administration; Awareness of customer needs in different markets, knowledge of international design standards and codes; and awareness of All-Island public sector tendering opportunities.

Export Knowledge Programme, Graduating Class of 2017

Condell Engineering	Cork Internet Exchange	Arthurstown Brewing
Herdwatch	Ocean Leaves	Yellow Belly Beer
Spotrack	Kelly Bros	The Natural Beauty Pot
Labcup	Maria Lucia Bakes	Ecclesville Printing Services
International House Galway	Virtue Brush	Kora Healthcare
Dovea Genetics	L'artisan Foods	

IEA and the German-Irish Chamber highlight business opportunities in Germany



The IEA and the German-Irish Chamber of Industry & Commerce collaborated on an event titled Diversifying Export Markets: A Focus on Germany, on 14th March. Over 50 exporters and service providers attended this event to be informed about opportunities for doing business with Germany, including Taxation, Co. Formation, Permanent Establishment & Labour. Attendees heard from experts on German-Irish trade and case studies of companies currently exporting to German markets. A lively panel discussion led by Simon McKeever, Chief Executive, Irish Exporters Association took place on industry opportunities and challenges in exporting to Germany.

L-R: Simon McKeever, Chief Executive, Irish Exporters Association; Patrick Bamming, Head of Tax and Legal Department, German-Irish Chamber; Ronan Harbison, Commercial Director, German-Irish Chamber; Michael Guinee, CEO & Founder, Ei Electronics; Orlaith Sweeney, Export Sales Manager, Keogh's Crisps at the Diversifying Export Markets: A Focus on Germany seminar. Copyright © 2017 German-Irish Chamber of Industry and Commerce, All rights reserved

Embark Programme

The IEA partnered with the LEO offices of Carlow, Kilkenny and Wicklow in 2017 to pilot the Embark Programme. The Programme was aimed at identifying small businesses with export potential and proactively helping them to prepare to exploit export opportunities through expert mentoring and advice. Selected companies received €5,000 worth of support in the form of mentoring, market exploration and prospecting advice.

Embark was carried out across three phases:

Phase one - The export readiness of nine companies were assessed, and of these, six companies were chosen to proceed to phase 2 of the project.

Phase two - Following a tendering process, Business Boost International provided research for the 6 companies, selected markets and partners for them and produced a strategy report for each.

Phase three - Evaluation by both Business Boost International and the IEA.

IEA Customs Services Offering



Pictured at Dublin Port launching the Customs digital Offering: Simon McKeever, Chief Executive, Irish Exporters Association and Carol Lynch, Partner, BDO

The IEA and BDO Customs and International Trade Services launched the IEA customs digital offering in March. Working together, the IEA and BDO offered IEA members guidance and advice on customs issues and challenges for export / import through a series of newsletters in 2017. The timing of these updates was especially crucial given the likely changes that Brexit, the Trump presidency and increasing uncertainty in the EU brought throughout the year for companies involved in the movement of goods into and out of Ireland.

IEA National & Regional Councils

The IEA established its regional growth and development strategy in 2016, a mandate of which was to establish a number of IEA Regional Boards to be made up of representatives from exporting businesses around the country. The West Regional Council was Chaired by John Carr, VP Supply Chain Solutions of Flextronics and the Cork Regional Council was chaired by Alan Fehily of Johnson and Johnson.

The purpose of these Regional Councils is: to increase IEA presence on the ground, enhance our ability to understand and develop solutions for the local issues that are affecting our members, and to ensure we strengthen the regional input into the main IEA National Council and into our policy development in general.

The remit of the IEA Regional Councils is to: provide a local point of contact to members; act as an advocate for the region, and the export requirements of members; and provide a succession platform to the IEA National Council. The aim is to be within arm's reach and available to members around the country providing a platform for businesses to be heard on local issues. The model of the Regional Council is 8-10 companies meeting around 4 times per year.

Acknowledgements

I would like to acknowledge the support and commitment of the National Council, their continued guidance and support to the Association has been invaluable. I am particularly grateful for the support, guidance and time commitment that members of the Regional Councils and subcommittees give to the organisation. I would like particularly to thank the Executive Council of 2017 for their support and ongoing contribution in their tenure: President's Paschal McCarthy and Nicola Byrne², Vice Presidents Marie Armstrong and David Carthy and Honorary Treasurer Kieran Spellman. I would also like to thank Ronnie O'Toole who has been our Honorary Economist since 2016, his commitment to the vision of the IEA is greatly appreciated.

I would also like to thank the team in the IEA for their dedication to the Association and for all the hard work and time they devote to delivering support to our members and helping us in our mission to assist them to grow their exports to world markets.

I am very grateful to the many partners we have in business who work with us and sponsor our various initiatives and also to our partners in Government and the Agencies who support us, as we support them, in our endeavours to serve our members and increase exports.

Finally, and most importantly, it would be impossible to do all that we do without the support of you, our members, and without the generosity of our varied sponsors of which there are many. I would especially like to express to you my gratitude for your continued support.

² Nicola Byrne took up the responsibilities of IEA President from Paschal McCarthy in July 2017.

Review of Irish Export Performance in 2017 and Outlook for 2018

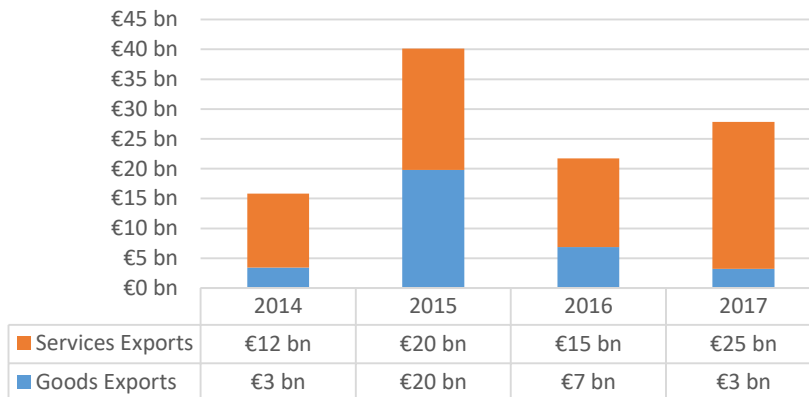


Dr. Ronnie O'Toole
IEA Honorary Economist

Overview – Irish Exports Post New Records

The value of Irish exports grew strongly in 2017, and are now running at twice the 2006 levels recorded prior to the global recession. Aggregate exports were €282bn, representing a rise of €28bn on 2016. Services industries continue to drive growth, increasing by €25bn year on year. 2016 was the first year that employment by foreign multinationals in Ireland's services industries out-stripped employment in manufacturing firms, though manufacturing still dominates among Irish-owned firms. The export of merchandise goods also had a good year, rising by €3bn to reach €122bn. This was an increase of 11% on the total of €254bn posted in 2016. 2017 was the eight successive year of overall export growth from Ireland following the fall in exports in 2008 and 2009 at the height of the global economic recession.

Year on Year Growth in Exports



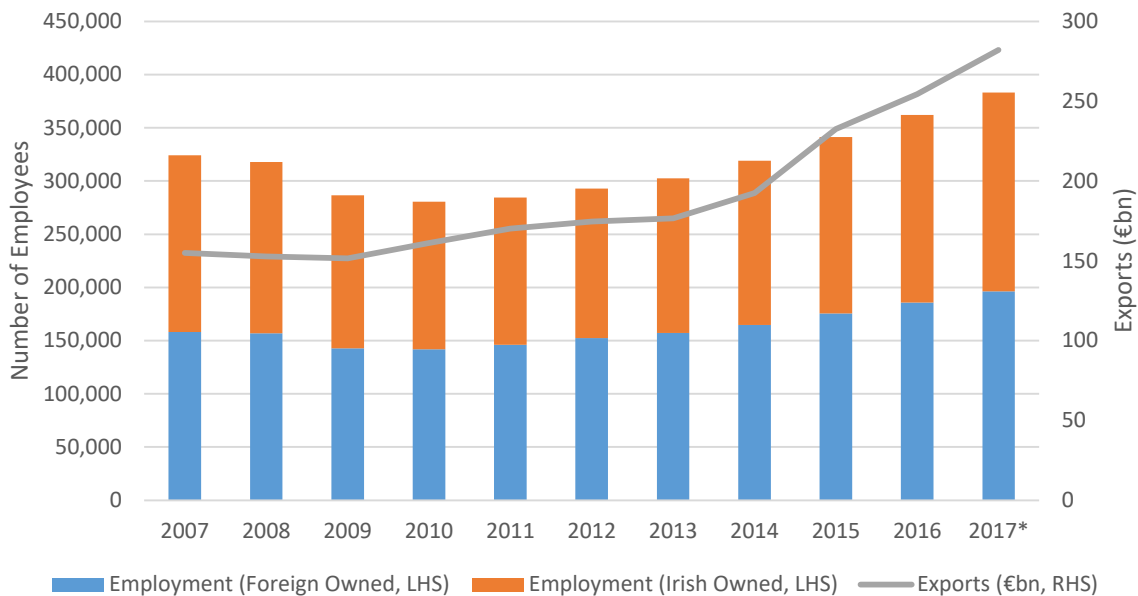
Ireland's 2017 Export Performance in Figures	
Goods:	€122bn
Services:	€160bn
Total:	€282bn

Source: CSO

Winning the War for Talent

Employment figures confirm the underlying strength of the exporting sector in Ireland. Aggregate employment in agency-supported firms (IDA Ireland and Enterprise Ireland) reached 383,000 in 2017, a full 100,000 higher than in 2010 when it fell to its post-recession low. Ireland is once again experiencing net immigration to fill these jobs as it continues to attract highly skilled workers from abroad. Almost two out of three immigrants to Ireland have a third-level qualification, though emigrants generally have a lower qualification level. This represents a migration "brain-bonus", a reversal of the "brain-drain" Ireland suffered in the 1980s as many highly educated workers emigrated in search of better job prospects.

Export Value and Employment, 2007-2017



Source: Annual Employment Survey; CSO. 2017 employment figures taken from EI/IDA press releases.

Food and chemicals exports drive goods exports

Goods exports rose 3% (€3bn) in 2017. This was driven mostly by two sectors, namely agri-food (+€1.3bn) and chemicals (+€1.4bn). The surge in food exports was driven by dairy products, with stronger volumes boosted by a surge in global wholesale prices. Global agricultural commodity prices as measured by the FAO Food Price Index were up 8% in 2017 compared to 2016, driven largely by the dairy sector which saw global prices rise by 32%, prices that have been sustained in 2018. The rise in chemical exports was accounted for by an increase in exports of medicinal and pharmaceutical products.

Goods Exports Classified by Sector

	2015 €million	% Change	2016 €million	% Change	2017 €million
Total food and live animals	9,878	2%	10,096	13%	11,374
Beverages and tobacco	1,288	4%	1,334	2%	1,363
Crude materials, inedible, except fuels	1,771	-14%	1,529	19%	1,814
Mineral fuels, lubricants & related	773	-11%	691	43%	992
Animal and vegetable oils, fats & waxes	57	37%	78	17%	91
Chemicals and related products, n.e.s.	64,224	3%	66,385	2%	67,821
Manufactured goods classified by material	2,105	2%	2,144	6%	2,276
Machinery and transport equipment	16,808	27%	21,420	-2%	20,892
Miscellaneous manufactured articles	14,299	2%	14,645	1%	14,854
Commodities and transactions n.e.s.	1,205	-20%	969	5%	1,014
Total Goods Exports	112,407	6%	119,292	3%	122,492

Source: CSO

Service exports ratio one of the largest in the EU

Services exports surged again in 2017, rising €25bn to almost €160bn, representing an increase of 18% over the strong 2016 outcome. As in 2016, the rise in services exports was broadly based, with double-digit percentage rises in computer services; financial services and business services. Computer services continue to represent the largest services exporter, having more than doubled in value over the last five years. This sector alone accounts for €1 in every €4 of total Irish export revenue. Services exporters now account for 57% of exports, one of the highest ratios in the EU.

Services Exports Classified by Sector

	2015 €million	% Change	2016 €million	% Change	2017 €million
Repairs and processing	1,582	60%	2,527	-11%	2,254
Transport	6,553	10%	7,225	12%	8,086
Tourism and travel	4,315	9%	4,685	6%	4,972
Communications	684	5%	719	-14%	617
Insurance	10,309	-10%	9,296	7%	9,913
Financial services	12,487	6%	13,287	15%	15,309
Computer services	50,398	15%	58,079	19%	69,323
Royalties/licences	7,325	10%	8,052	19%	9,608
Business Services	23,031	31%	30,093	23%	37,075
Other services not elsewhere stated	3,554	-69%	1,113	129%	2,546
Total Services Exports	120,238	12%	135,076	18%	159,701

Source: CSO

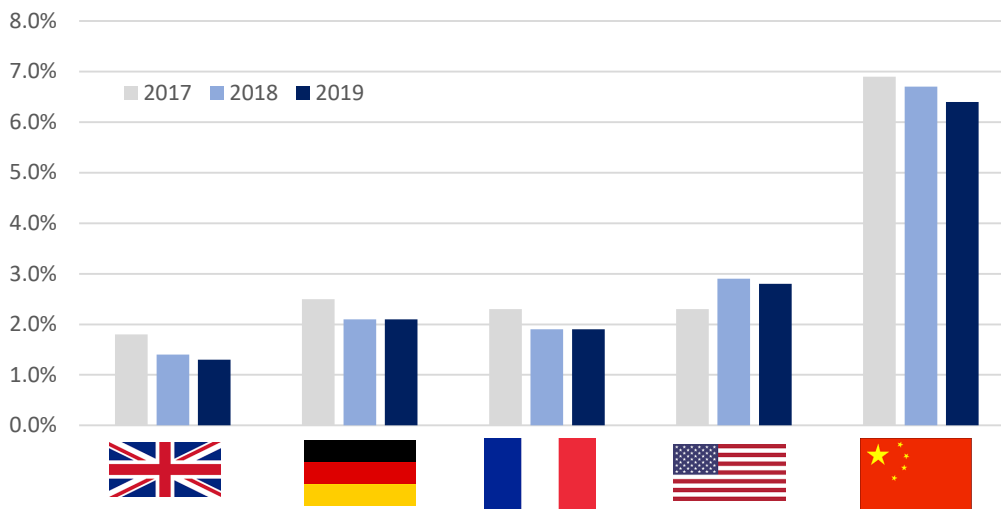
2017 represented another year that Irish exporters further diversified their markets. This was particularly evident in relation to services exports, with a surge in the value of sales outside of the EU. These markets now represent 54% of services exports, up from 47% as recently as 2015. In contrast, the composition of merchandise exports by destination was relatively stable in 2017 when compared with services flows.

Evidence also suggests that the rate of innovation in Irish businesses is increasing. Data on innovation expenditure by Irish enterprises shows that in-house R&D expenditure rose to €2.2bn in 2016 (the latest year for which there are estimates), a 17% increase on the figure posted for 2014. Total innovation expenditures, which includes the purchase of machinery, equipment and software, is now €4.6bn annually, a €1bn increase on the 2012 level. This is also reflected in the strong export performance of a number of high-tech sectors, such as computer services.

Outlook for 2018/9

Economic growth worldwide remains steady, and this is forecasted to continue into 2019. This is particularly evident in non-EU markets, which are increasingly important to Irish exporters. The weakest outlook remains for the UK, with consumer spending and business investment remaining subdued. The uncertainty of Brexit continues to weigh on the economy, while interest rates have now started rising above their post-crisis lows in response to the normalisation of inflation. The European economy remains strong, however. Consumer and business confidence remains high, core inflation subdued, and the ECB have signalled that interest rates are likely to remain at their current historic lows until Summer 2019 at least.

World Economic Growth Prospects



Source: OECD, May 2018

The risks of protectionism

The global trade outlook is currently dominated by the potential impact of trade protectionism. Close to home, the final shape of the post-Brexit trade deal between the EU and the UK remains unclear. Ireland is uniquely exposed to Brexit due to a very high trade intensity with the UK, particularly in sectors such as agri-food. As well as the impact of trade barriers, an estimated 53% of Irish goods exports to all countries other than the UK are transported via the UK ‘landbridge’ which would be impacted by the introduction of border procedures. In a study commissioned by the Irish Government, all Brexit scenarios are expected to have negative impacts on Irish trade.

The risk of protectionism is also evident in the measures announced by President Trump, which to date have impacted around 4% of US imports. Further tariff hikes have been threatened, in particular a 25% tariff on Chinese imports. To date, the impact of these tariffs have been limited. WTO figures suggest that new measures to lower trade barriers exceeded the coverage of new measures to increase barriers. For example, the recently signed EU-Japan Economic Partnership Agreement eliminates virtually all tariffs between the two regions. As such, while trade protectionism remains a risk to future trade, to date the main impact has been to stall the process of trade openness.

A more important risk to future trade, however, lies in the strength of global demand, and Ireland’s ability to respond to it. World trade growth was rapid in the two decades prior to the global financial crisis but has halved subsequently. Despite this, Ireland has continued building on its reputation as one of Europe’s most strongly performing exporting success stories, a performance it can build on further in 2018 and 2019.

The main challenge to this is internal rather than external. Despite robust growth in employment, labour cost growth in Ireland has remained modest in recent years and below the growth experienced in both the UK and the EU. However, with unemployment having now fallen to 5.1%, Ireland is once again close to its ‘full employment’ level and competition for scarce labour is once again intense. In this environment, evidence of rising labour costs are now emerging, with average weekly earnings up 2.4% in the year to Q1 2018. Maintaining cost competitiveness, while continuing to win the war on talent, will be Ireland’s greatest challenge over the next 3-5 years.

For any comments or queries: ronnie.otoole@gmail.com

Audited Accounts for year-end 31st Dec 2017

INCOME AND EXPENDITURE ACCOUNT for the year ended 31 December 2017

	2017	2016
	€	€
Income	1,636,718	1,512,321
Expenditure	(1,647,377)	(1,504,732)
	<hr/>	<hr/>
(Deficit)/surplus before interest	(10,659)	7,589
Interest payable and similar charges	(2)	(3,526)
	<hr/>	<hr/>
(Deficit)/surplus before tax	(10,661)	4,063
Tax on (deficit)/surplus on ordinary activities	-	-
	<hr/>	<hr/>
(Deficit)/surplus on ordinary activities after taxation	(10,661)	4,063
	<hr/>	<hr/>
(Deficit)/surplus for the year	(10,661)	4,063
	<hr/> <hr/>	<hr/> <hr/>

BALANCE SHEET
for the year ended 31 December 2017

	2,017	2,016
	€	€
Fixed Assets		
Tangible assets	8,656	9,925
	_____	_____
Current Assets		
Debtors	303,269	260,754
Cash and cash equivalents	101,215	185,400
	_____	_____
	404,484	446,154
	_____	_____
Creditors: Amounts falling due within one year	(232,581)	(264,859)
	_____	_____
Net Current Assets	171,903	181,295
	_____	_____
Total Assets less Current Liabilities	180,559	191,220
	_____	_____
	_____	_____
Reserves		
Income and expenditure account	180,559	191,220
	_____	_____
Members' Funds	180,559	191,220
	_____	_____
	_____	_____



Consular Services
part of the
Irish Exporters Association

Consular Services

The Irish Exporters Association (IEA) Consular Services Department can assist EU and non EU nationals who have an Irish residency stamp in obtaining business and tourist visas.

Service includes:

- Dedicated experienced Relationship Manager who will lodge all Embassy applications
- Documents handled securely and confidentially
- Comprehensive range of destinations covered
- Express service available
- Multiple applications processed

Why use our service?

- Saves time and resources
- Secure and confidential
- Reduces costs
- Personal, professional and expert service

Visa Service

We will send you the current application forms and work with you step by step to complete the requirements needed to assist you with your visa.

Legalisation of Documents

We will process your documents through the relevant Chambers, Notaries Public, Embassies, Department of Foreign Affairs and Trade.

Advisory Service

Have a query about your passport, visa criteria or legalisation documents for export? Contact us today



Contact Details:

For further information on our consular services, please visit our website www.irishexporters.ie
Tel: 01 661 2182
Email: consular@irishexporters.ie
[@IrishExporters](https://twitter.com/IrishExporters)

Disclaimer

The Irish Exporters Association expects turnaround visas and legalisations within a stated time frame. However, due to the nature of the service, we cannot guarantee a return completion date.

While all reasonable care will be given, the IEA will accept no liability for any loss resulting from an error of any kind by it, its employees and agents, in the processing of visas and legalisations or from loss or delay in dealing with documents.



National Council of IEA of 2017

IEA President

Nicola Byrne, Cloud 90

IEA Senior Vice President

Marie Armstrong, KPMG

IEA Junior Vice President

David Carthy, DLA Piper International LLP

IEA Honorary Treasurer

Kieran Spellman, Honorary Treasurer

Honorary Economist

Ronnie O'Toole

Alan Fehily, J&J DePuySynthes

Colin Dunne, IWT

Daniel Hickey, AllinAll Ingredients

James McGee, Athlone Extrusions

John Carr, Flextronics

John Mee, Glanbia

Michael Sanfey, Aer Lingus Cargo

Paschal McCarthy, Paschal McCarthy Management and Consultancy Service

Patrick Joy, Suretank

Suzanne Trehy, CRH

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Ray Hunt, Financial Controller

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